



“WE WORKED
VERY HARD FOR
WHAT WE HAVE.
IF IT’S GOING TO
DO ANYTHING,
LET IT DO SOME
GOOD TO HELP
OTHERS.”



Have You Reviewed Your Estate Plan Lately?

Like many people, you probably have a Will and/or a Living Trust in place. But important assets - life insurance, brokerage or bank accounts, jointly owned property and, in particular, retirement accounts - may be set up to pass outside of your Will or Trust through beneficiary designations. They can present a variety of tax and legal traps that may negatively affect your estate distribution plans for your heirs. **We can help.**

FREE Will Planning Guide

Has valuable information on planning a legacy that conveys your assets, responsibilities, values, and beliefs in an orderly, thoughtful way to those you trust and wish to honor.

On-Line Will Creation

If you do not have a Will, we can provide access to three on-line FREE or very affordable options to create or update your document.

Review of your Estate Plan

We offer a FREE in-depth review of your existing Will or Living Trust and will help ensure that you have all the other necessary documents in place such as a Health Care Directive and Powers of Attorney.

Request a FREE Will Guide, Will Creation or Plan Review:

Scan the QR Code to order.

